

0012740-03400

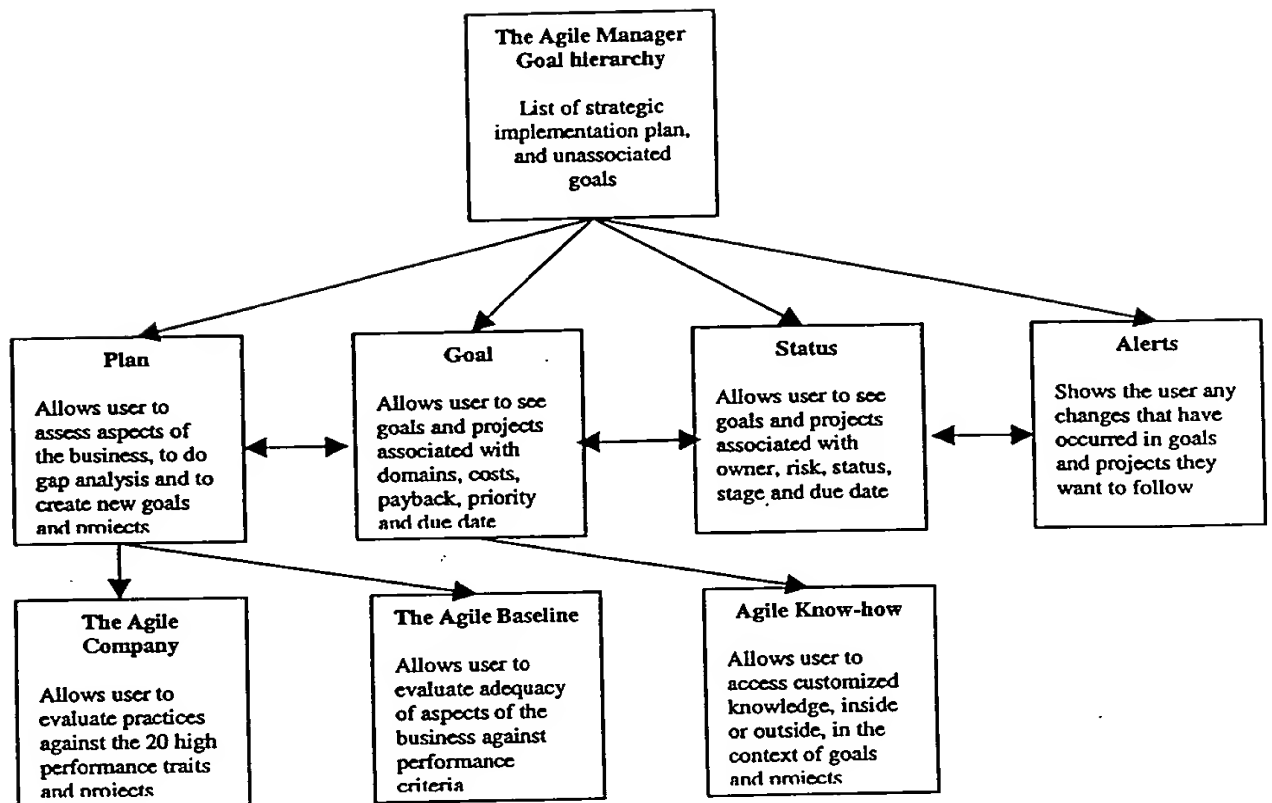


FIG. 1

0912740:051409
664750:042260

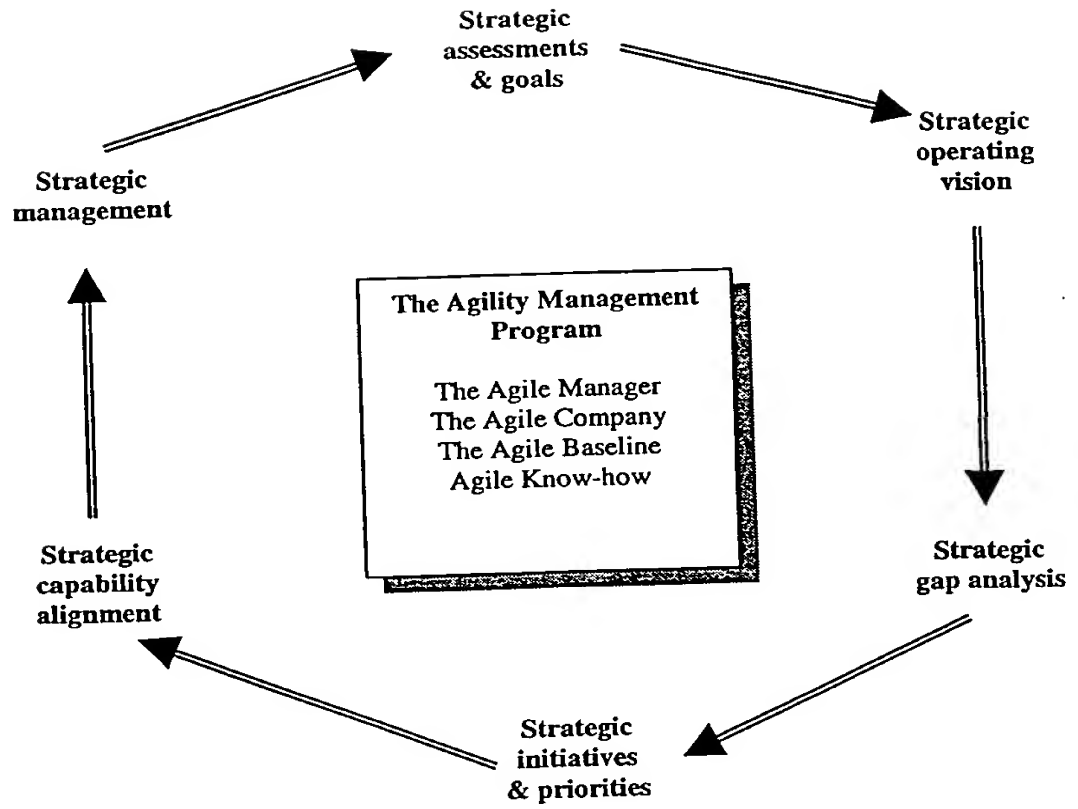


FIG. 2

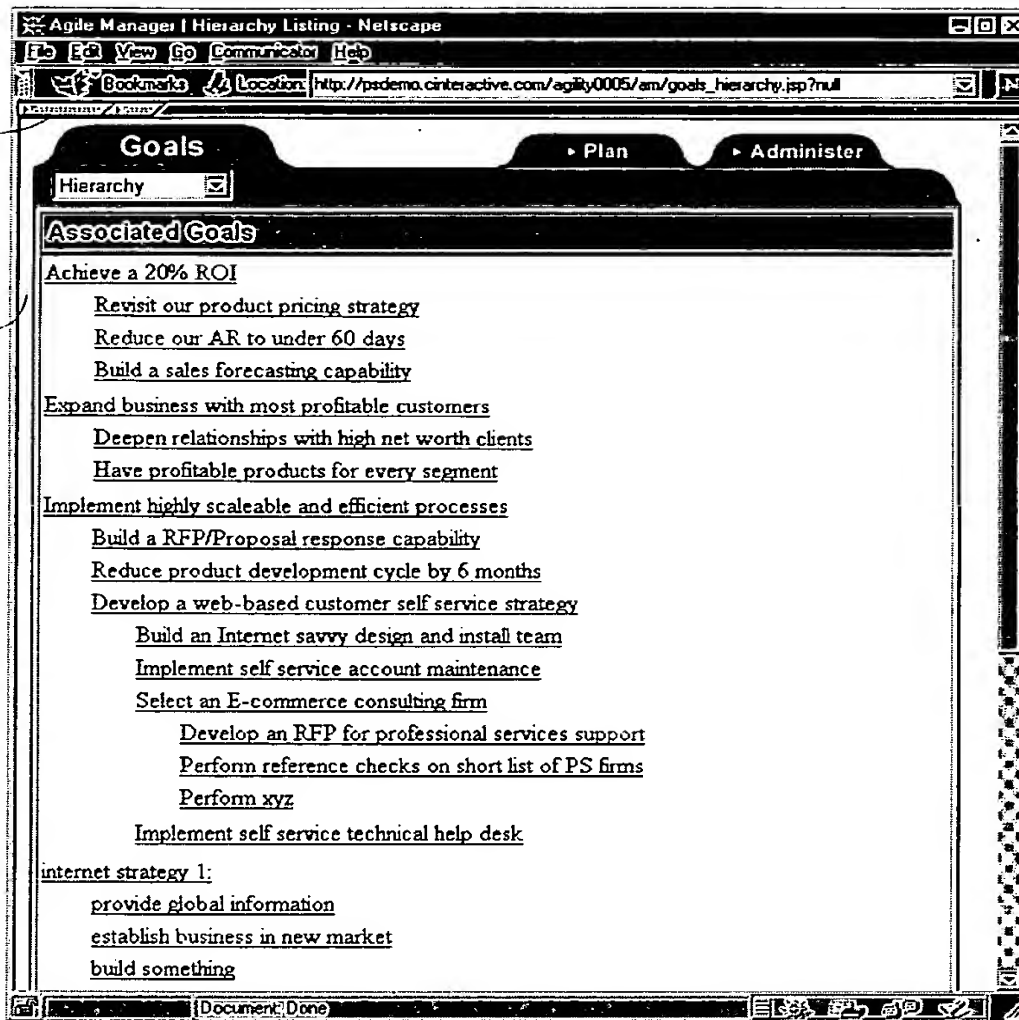


FIG. 3

09342740:054496
664450:04221E60

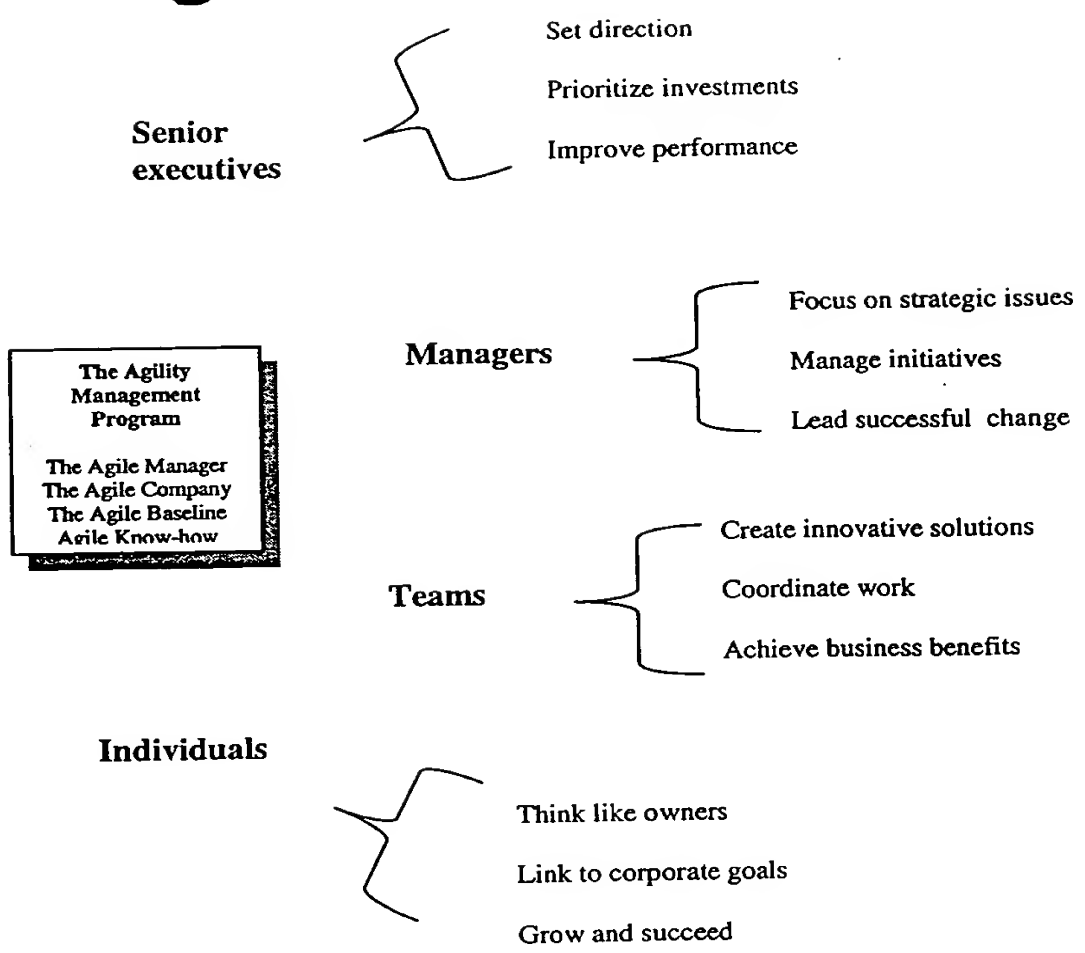


FIG. 4

Research based *Diagnostics* reduce organizational barriers

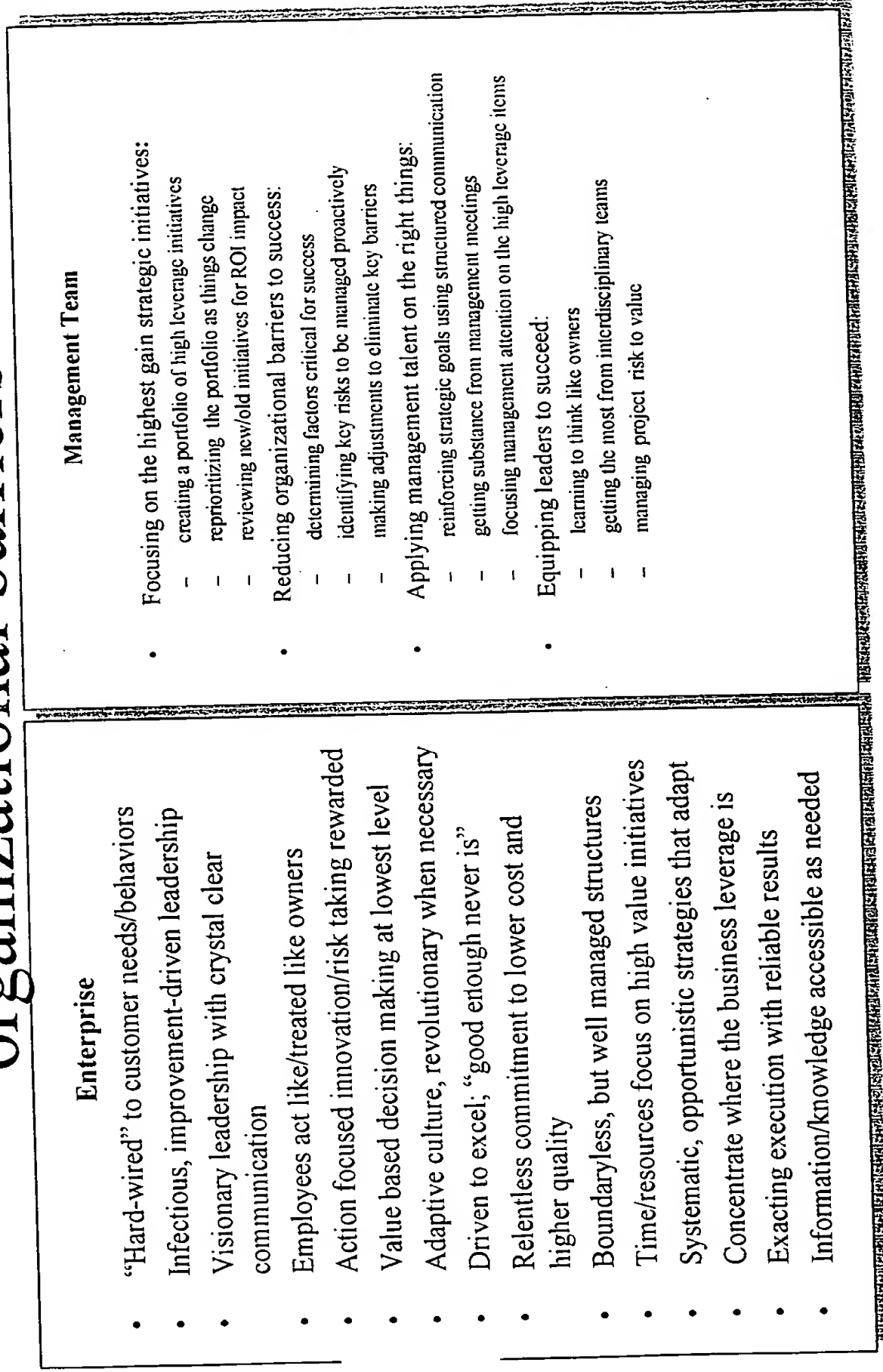


FIG. 5

00312740-051409

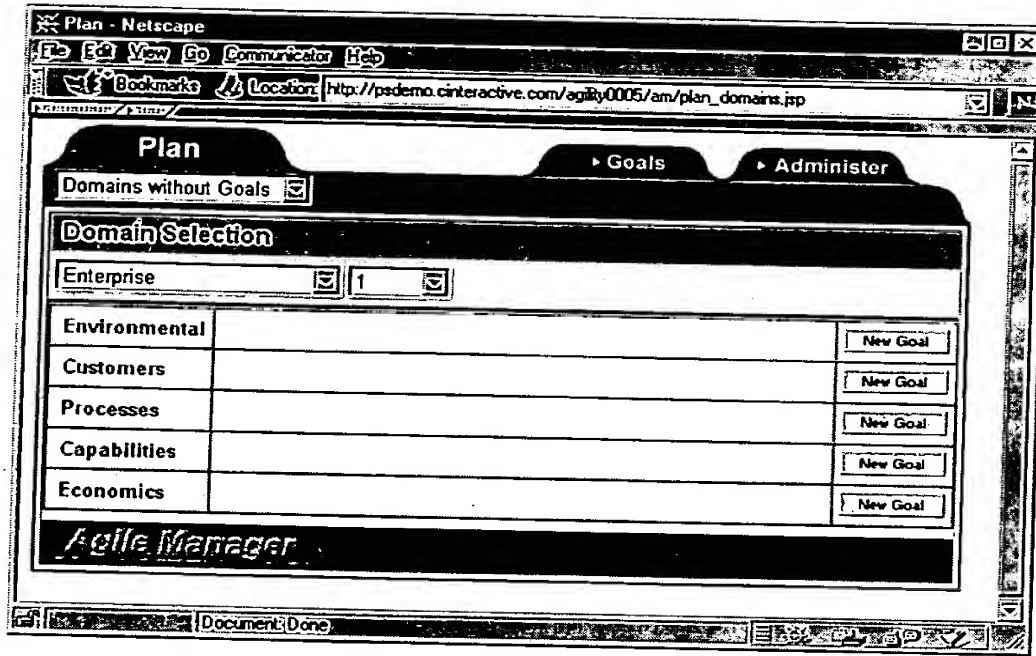


FIG. 6

00312740-051409

Edit New Goal - Netscape

File Edit View Go Communicator Help

Bookmarks Location [/0005/am/act_new_project.jsp?parent=PSCD8565336755E10072391DBEA017F50](#)

Add a Contributing Goal

New Goal

Goal Name

Goal Objective

Domain:

Status:

Priority:

Risk:

Stage:

Due Date:

Investment:

Return:

Agile Manager

Document: Done

FIG. 7

Fig. 8

00342740-051499

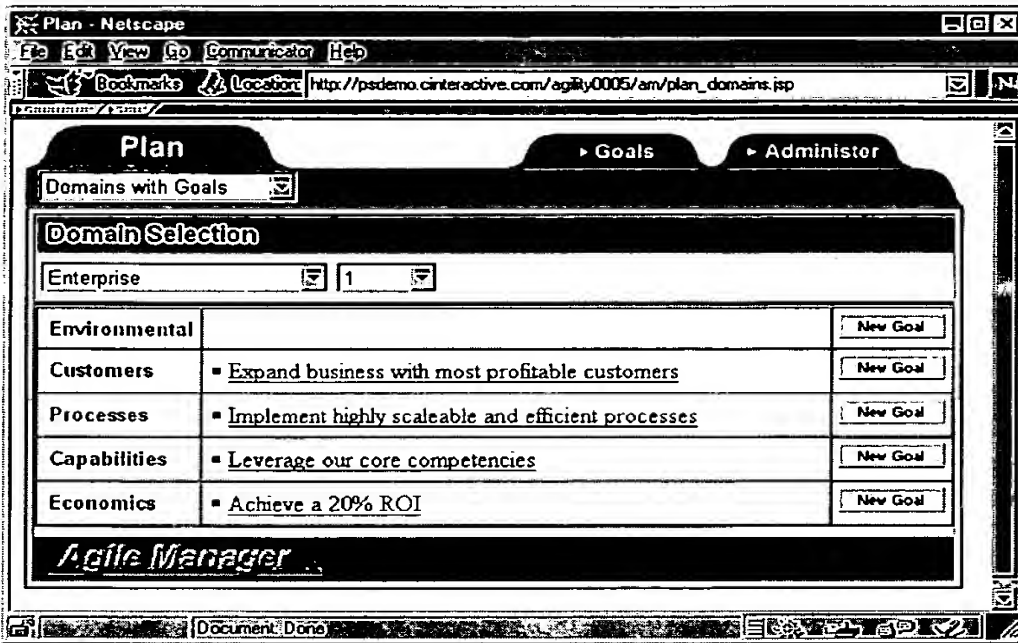


FIG. 9

Values

Business development assessment

current situation vs. desired state

1 points 7 6

Current Value	Target Value	Label
5	3	business people vs. just sales people
6.5	2.5	sell solutions not just products
7	4	customer vs. internally focused
6	3.5	business makers vs. order takers
5	4	profitability vs. sales focused
6	4.5	deal well at senior vs. just technical level
5.5	4	world class vs. unacceptable service
7	3	build value based client relationships
0	0	

Score: 84

Increment: 3

OK

Cancel

Clear

FIG. 10

09342740-054499

Business development assessment

current situation vs. desired state

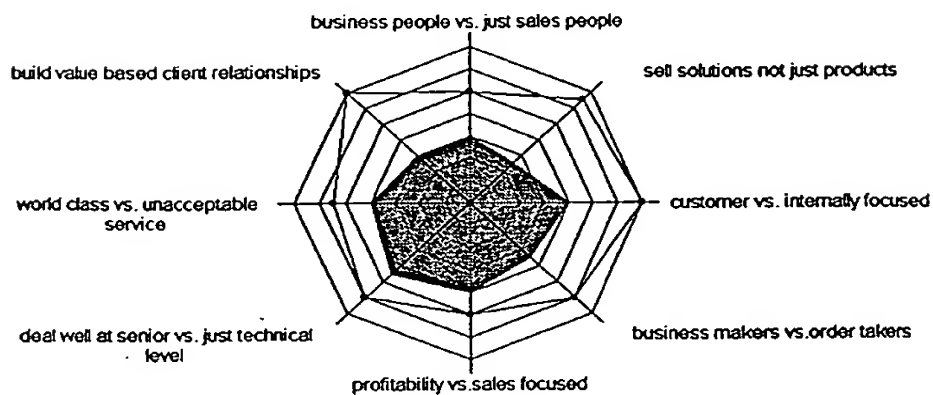


FIG. 11

Agile Manager | Act | Gap Analysis - Netscape

File Edit View Go Communicator Help

Bookmarks Location /act_gaps.jsp?domain=&depth=depth&proj=PSCD8565336755E10D72391D8EA017F

Act Goals Plan Administer

Gap Analysis

Expand business with most profitable customers

Cross sell and up sell our products to our existing client base from a position of strength.

Enterprise Depth

Domain	Contributing Goal	Actual/Desired	Gap	
Environmental				Add
Market Trends				Add
Competitors				Add
Technical Innovation				Add
Regulatory				Add
Customers				Add
Relationships	Deepen relationships with high net worth clients	10 / 10	0	Add
Products	Have profitable products for every segment	6 / 10	4	Add
Services				Add
Processes				Add
Core Processes				Add
Business Acquisition				Add
Business Development				Add
Product Development				Add

Document Done

FIG. 12

064450" 0422E60

Expand business with most profitable customers | Summary - Netscape

File Edit View Go Communicator Help

Bookmarks Location /agility0005/am/act_summary.jsp?proj=PS CDB565336755E10072391D8EA017F30

Act ▶ Goals ▶ Plan ▶ Administer

Summary ☒

Expand business with most profitable customers

Parent Goal:

Owner: Doug Beaven

Objective Cross sell and up sell our products to our existing client base from a position of strength.	Domain: Customers Status: Onot started Due Date: 09/01/99 Actual Goal: Desired Goal: Gap: Priority: 5 Risk: 3 Stage: Analysis/Assessment Investment: \$125,000.00 Payback: \$16,750,000.00
--	---

History
(04/14/99) SubProject - Added subproject: Identify clients with the greatest \$ opportunity.
(04/14/99) SubProject - Added subproject: Have profitable products for every segment.
(04/13/99) Date - Target date changed to 09/01/99.
(04/13/99) Create - Project created.

Agile Manager

Document Done

FIG. 13

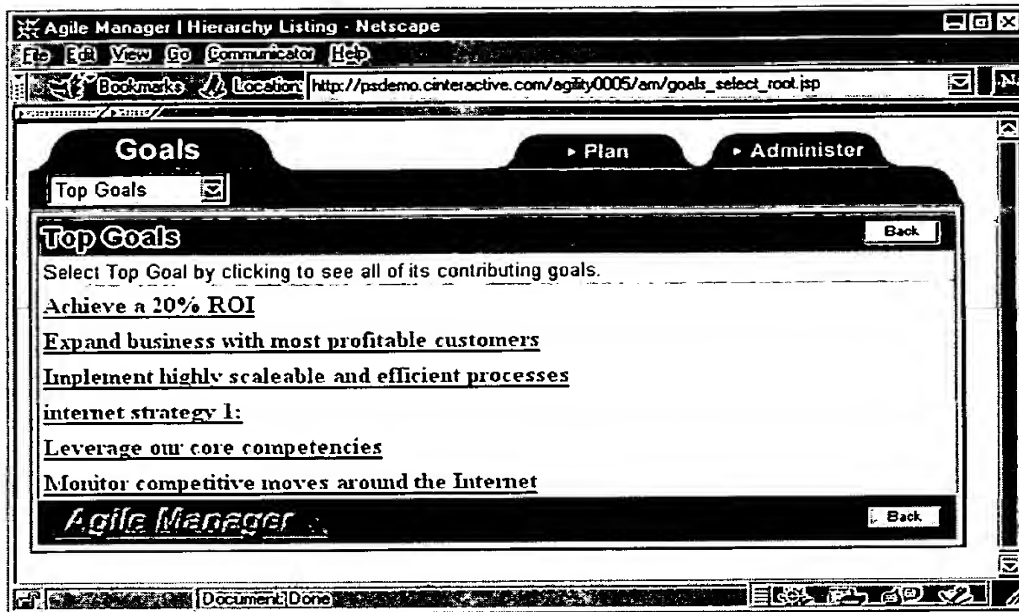


FIG. 14

664750" 04/27/60

Goals ▶ Plan ▶ Administer

[Select] ☒

View Contributing Goals Show Columns for: ☒ Priority

<u>Expand business with most profitable customers</u>	<u>Cost</u>	<u>Payback</u>	<u>Priority</u>	<u>Due</u>
<u>Deepen relationships with high net worth clients</u>	750,000	5,000,000	5	5w
<u>Have profitable products for every segment</u>	75,000	250,000	5	33w
Top Goal Totals	\$825,000.00	\$5,250,000.00		

FIG. 15

664450-0422E60

Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp

Goals ▶ Plan ▶ Administer

[Select]

View All Goals Show Columns for: Domain

	Cost	Payback	Priority	Due
Environmental				
<u>New Goal</u>	-	-	5	-
Competitors				
<u>Find new company or spin off threats</u>	5,000	50,000	5	10w
<u>Monitor competitive moves around the Internet</u>	5,000	50,000	3	8w
Technical Innovation				
<u>new internet straegy</u>	-	-	5	-
Customers				
<u>Expand business with most profitable customers</u>	125,000	16,750,000	5	17w
<u>Increase visibility</u>	-	-	5	-
Relationships				
<u>Ask clients about our perceived competencies</u>	10,000	500,000	5	1w
<u>Deepen relationships with high net worth clients</u>	750,000	5,000,000	5	6w
<u>Understand recent competitive wins</u>	1,000	10,000	5	4w
Products				
<u>Have profitable products for every segment</u>	75,000	250,000	5	34w
<u>Resell our back office processing capabilities</u>	50,000	250,000	3	21w
<u>Revisit our product pricing strategy</u>	20,000	1,500,000	5	6w
Services				
<u>Develop a web-based customer self service strategy</u>	450,000	2,800,000	4	21w

Document Done

FIG. 16

06/11/2001 09:21:00

Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location http://psdemo.cinteractive.com/egity0005/am/goals_sorted.jsp

Goals Plan Administer

Select

View All Goals Show Columns for Priority

	Cost	Payback	Priority	Due
<u>Build an Internet savvy design and install team</u>	1,000,000	5,000,000	4	-5w
<u>increase auto adjudication rates</u>	1,000,000	1,250,000	5	86w
<u>Deepen relationships with high net worth clients</u>	750,000	5,000,000	5	6w
<u>Increase our technology R&D capability</u>	555,555	2,000,000	5	34w
<u>Develop a web-based customer self service strategy</u>	450,000	2,800,000	4	21w
<u>Implement highly scaleable and efficient processes</u>	450,000	1,250,000	5	30w
<u>Select an E-commerce consulting firm</u>	300,000	1,000,000	4	4w
<u>Achieve a 20% ROI</u>	250,000	1,250,000	5	34w
<u>Develop an RFP for professional services support</u>	250,000	1,000,000	5	-3w
<u>Recruit and hire world class industry talent</u>	250,000	1,000,000	5	34w
<u>Reduce product development cycle by 6 months</u>	250,000	500,000	4	17w
<u>Implement GSTP by yearend</u>	150,000	10,000,000	5	34w
<u>Expand business with most profitable customers</u>	125,000	16,750,000	5	17w
<u>Implement self service technical help desk</u>	85,000	100,000	4	6w
<u>Build a RFP/Proposal response capability</u>	75,000	100,000	4	8w
<u>Have profitable products for every segment</u>	75,000	250,000	5	34w
<u>Implement self service account maintenance</u>	65,000	2,000,000	4	1w
<u>Resell our back office processing capabilities</u>	50,000	250,000	3	21w
<u>Build a sales forecasting capability</u>	35,000	100,000	4	12w
<u>Revisit our product pricing strategy</u>	20,000	1,500,000	5	6w

Document Done

FIG. 17

0014740 0027E60

Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp

Goals

[Select]

Plan Administer

View All Goals

Show Columns for Status

	Risk	Owner	Stage	Status	Due
○ Ask clients about our perceived competencies	5	Doug Beaven	Requirements Gathering	not started	1w
○ Develop a web-based customer self service strategy	5	Joe Smith	Requirements Gathering	on track	21w
○ Find new company or spin off threats	5	Doug Beaven	Implement	not started	10w
○ Implement GSTP by yearend	5	Doug Beaven	Analysis/Assessment	on track	34w
○ Implement self service technical help desk	5	Mike Jones	Business Case Development	on track	6w
○ Increase our technology R&D capability	5	Joe Smith	Prototype	not started	34w
○ Increase visibility	5	chris curran	-	not started	-
○ New Goal	5	Doug Beaven	-	not started	-
○ Perform xyz	5	Doug Beaven	-	not started	-
○ Recruit and hire world class industry talent	5	Doug Beaven	Roll-out	on track	34w
○ Reduce our AR to under 60 days	5	Doug Beaven	Implement	off track	8w
○ Understand recent competitive wins	5	Mike Jones	Analysis/Assessment	on track	4w
○ Increase auto adjudication rates	5	Doug Beaven	Build	on track	86w
○ Internet strategy 1:	5	Doug Beaven	-	not started	-

Document Done

FIG. 18

66750-042160

Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp

Goals

Plan Administer

[Select]

View All Goals

Show Columns for: Priority

	Cost	Payback	Priority	Due
<u>Build an Internet savvy design and install team</u>	1,000,000	5,000,000	4	-5w
<u>increase auto adjudication rates</u>	1,000,000	1,250,000	5	86w
<u>Deepen relationships with high net worth clients</u>	750,000	5,000,000	5	6w
<u>Increase our technology R&D capability</u>	555,555	2,000,000	5	34w
<u>Develop a web-based customer self service strategy</u>	450,000	2,800,000	4	21w
<u>Implement highly scaleable and efficient processes</u>	450,000	1,250,000	5	30w
<u>Select an E-commerce consulting firm</u>	300,000	1,000,000	4	4w
<u>Achieve a 20% ROI</u>	250,000	1,250,000	5	34w
<u>Develop an RFP for professional services support</u>	250,000	1,000,000	5	-3w
<u>Recruit and hire world class industry talent</u>	250,000	1,000,000	5	34w
<u>Reduce product development cycle by 6 months</u>	250,000	500,000	4	17w
<u>Implement GSTP by yearend</u>	150,000	10,000,000	5	34w
<u>Expand business with most profitable customers</u>	125,000	16,750,000	5	17w
<u>Implement self service technical help desk</u>	85,000	100,000	4	6w
<u>Build a RFP/Proposal response capability</u>	75,000	100,000	4	8w
<u>Have profitable products for every segment</u>	75,000	250,000	5	34w
<u>Implement self service account maintenance</u>	65,000	2,000,000	4	1w
<u>Resell our back office processing capabilities</u>	50,000	250,000	3	21w
<u>Build a sales forecasting capability</u>	35,000	100,000	4	12w
<u>Revisit our product pricing strategy</u>	20,000	1,500,000	5	6w

Document: Done

FIG. 19

Agile Manager | Hierarchy Listing - Netscape

Bookmarks Location: http://psdemo.cinteractive.com/agility0005/aim/goals_sorted.jsp

Goals > Plan > Administer

[Select]

View All Goals Show Columns for: Priority

	Cost	Payback	Priority	Due
<u>Expand business with most profitable customers</u>	125,000	16,750,000	5	17w
<u>Implement GSTP by yearend</u>	150,000	10,000,000	5	34w
<u>Build an Internet savvy design and install team</u>	1,000,000	5,000,000	4	-5w
<u>Deepen relationships with high net worth clients</u>	750,000	5,000,000	5	6w
<u>Develop a web-based customer self service strategy</u>	450,000	2,800,000	4	21w
<u>Reduce Breakeven on New Business</u>	10,000	2,500,000	4	8w
<u>Implement self service account maintenance</u>	65,000	2,000,000	4	1w
<u>Increase our technology R&D capability</u>	555,555	2,000,000	5	34w
<u>Revisit our product pricing strategy</u>	20,000	1,500,000	5	6w
<u>Achieve a 20% ROI</u>	250,000	1,250,000	5	34w
<u>Implement highly scaleable and efficient processes</u>	450,000	1,250,000	5	30w
<u>increase auto adjudication rates</u>	1,000,000	1,250,000	5	86w
<u>Develop an RFP for professional services support</u>	250,000	1,000,000	5	-3w
<u>Recruit and hire world class industry talent</u>	250,000	1,000,000	5	34w
<u>Select an E-commerce consulting firm</u>	300,000	1,000,000	4	4w
<u>Ask clients about our perceived competencies</u>	10,000	500,000	5	1w
<u>Reduce product development cycle by 6 months</u>	250,000	500,000	4	17w
<u>Have profitable products for every segment</u>	75,000	250,000	5	34w
<u>Resell our back office processing capabilities</u>	50,000	250,000	3	21w
<u>Reduce our AR to under 60 days</u>	5,000	150,000	5	8w

[Document] Done

FIG. 20

00342740 051499 064750 04/22/00

Goals

► Plan

► Administer

[Selected]

View All Goals

Show Columns for

Status

	Risk	Owner	Stage	Status	Due
○ <u>Have profitable products for every segment</u>	4	<u>Mike Jones</u>	Requirements Gathering	needs attention	33w
○ <u>Monitor competitive moves around the Internet</u>	3	<u>Doug Beaven</u>	Analysis/Assessment	needs attention	7w
○ <u>Reduce Breakeven on New Business</u>	4	<u>Doug Beaven</u>	Implement	needs attention	7w
● <u>Develop an RFP for professional services support</u>	4	<u>Joe Smith</u>	Retrospective Review	completed	-4w
● <u>Perform reference checks on short list of PS firms</u>	4	<u>Doug Beaven</u>	Retrospective Review	completed	-2w
○ <u>Ask clients about our perceived competencies</u>	5	<u>Doug Beaven</u>	Requirements Gathering	not started	1d
○ <u>Eclipse competition with our e-comm capability</u>	5	<u>Doug Beaven</u>	-	not started	-
○ <u>Expand business with most profitable customers</u>	3	<u>Doug Beaven</u>	Analysis/Assessment	not started	16w
○ <u>Find new company or spin off threats</u>	5	<u>Doug Beaven</u>	Implement	not started	9w

FIG. 21

Goals ► Plan ► Administer

[Select] ☒

[Select]

- Hierarchy
- Select Domain
- Top Goals
- All Goals
- Alerts
- Search
- New Goal

Show Columns for: ☒ Status

	<u>Risk</u>	<u>Owner</u>	<u>Stage</u>	<u>Status</u>	<u>Due</u>
products for	4	<u>Mike Jones</u>	Requirements Gathering	needs attention	33w
ive moves	3	<u>Doug Beaven</u>	Analysis/Assessment	needs attention	7w
around the Internet					
○ <u>Reduce Breakeven on New Business</u>	4	<u>Doug Beaven</u>	Implement	needs attention	7w
● <u>Develop an RFP for professional services support</u>	4	<u>Joe Smith</u>	Retrospective Review	completed	-4w
● <u>Perform reference checks on short list of PS firms</u>	4	<u>Doug Beaven</u>	Retrospective Review	completed	-2w
○ <u>Ask clients about our perceived competencies</u>	5	<u>Doug Beaven</u>	Requirements Gathering	not started	1d
○ <u>Eclipse competition with our e-comm capability</u>	5	<u>Doug Beaven</u>	-	not started	-
○ <u>Expand business with most profitable customers</u>	3	<u>Doug Beaven</u>	Analysis/Assessment	not started	16w
○ <u>Find new company or spin off threats</u>	5	<u>Doug Beaven</u>	Implement	not started	9w
○ <u>Increase our technology R&D</u>	5	<u>Joe Smith</u>	Prototype	not started	33w

FIG. 22

Goals

Plan
Administer

[Select]

View Contributing Goals

Show Columns for: Domain

Expand business with most profitable customers	Cost	Payback	Priority	Due
Customers				
Relationships				
Deepen relationships with high net worth clients	750,000	5,000,000	5	5w
Products				
Have profitable products for every segment	75,000	250,000	5	33w
Top Goal Total:	\$825,000.00	\$5,250,000.00		

FIG. 23

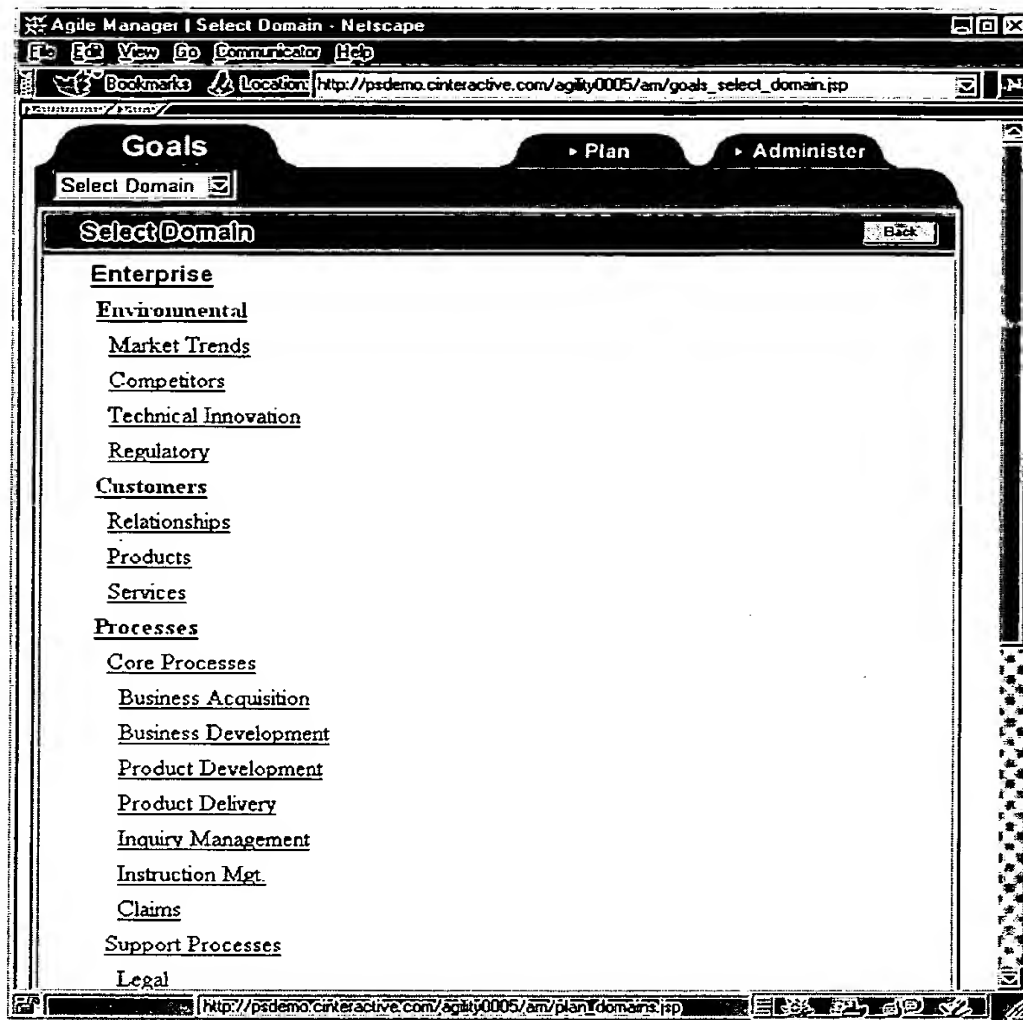


FIG. 24

Plan
Goals
Administer

☒ Domains with Goals

Domain Selection

☒ Relationships
☒ Depth

Relationships	<ul style="list-style-type: none"> ▪ <u>Ask clients about our perceived competencies</u> ▪ <u>Deepen relationships with high net worth clients</u> ▪ <u>Understand recent competitive wins</u> ▪ <u>build the franchise around customer satisfaction</u> 	<input type="button" value="New Goal"/>
---------------	--	---

FIG. 25

09342740-051490

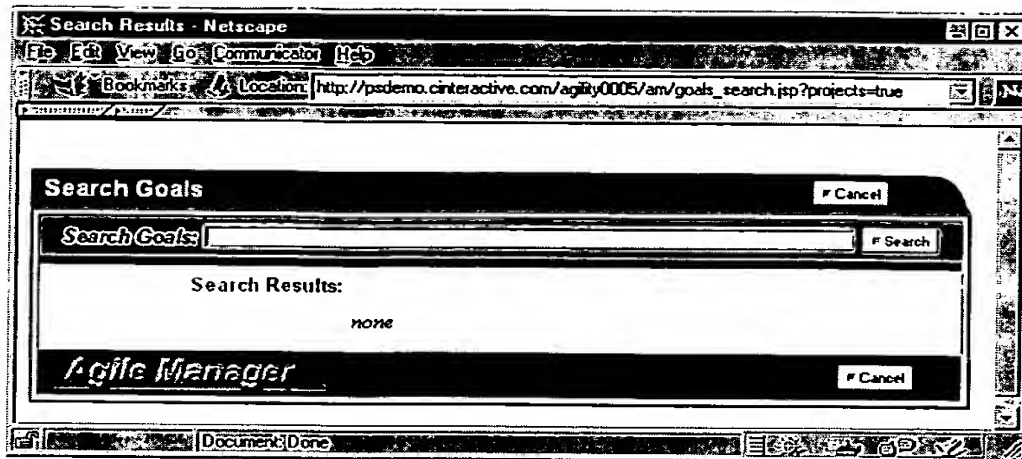


FIG. 26

09312740-05140
664150-0421E60

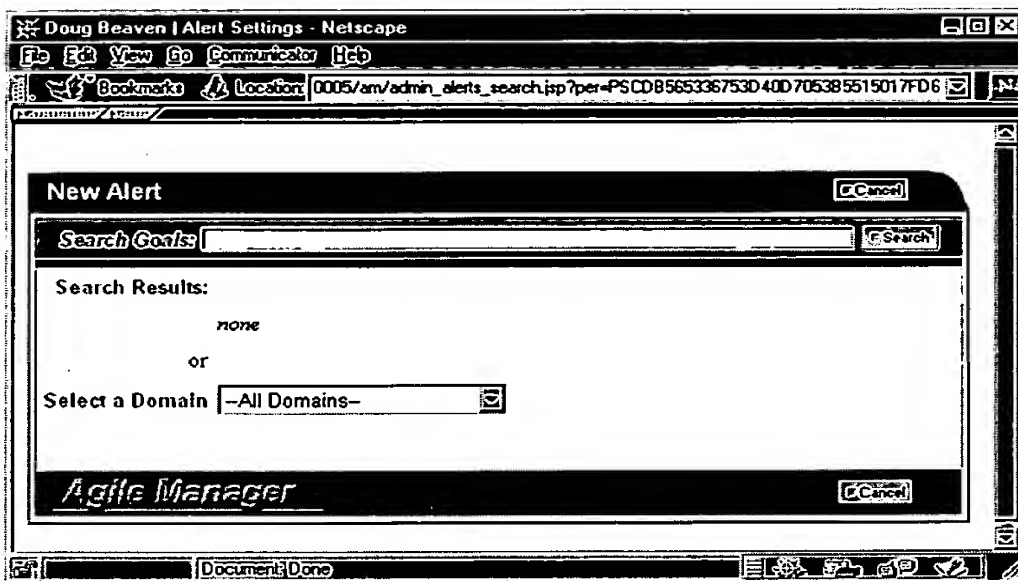


FIG. 27

00213740:051400

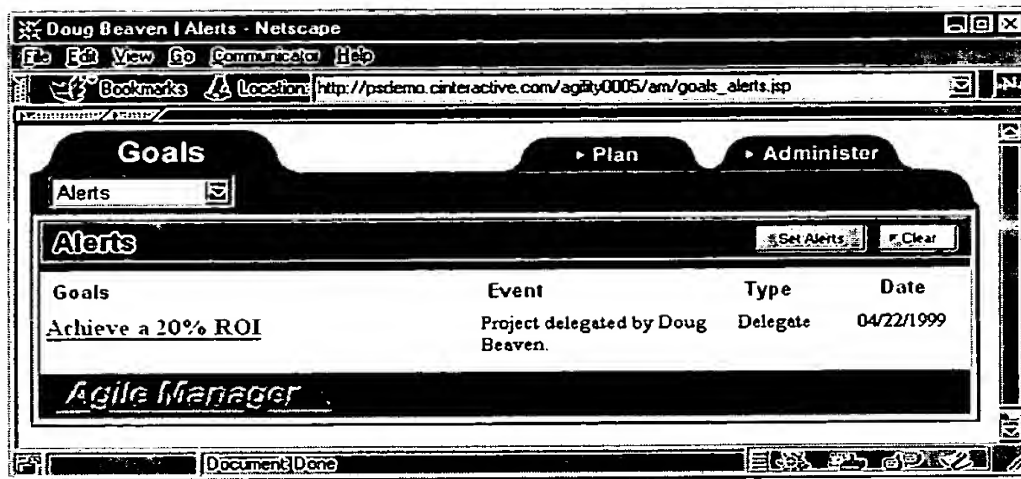


FIG. 28

00312740:051499
66hT50:0422E60

Expand business with most profitable customers | Control Panel - Netscape

File Edit View Go Communicator Help

Bookmarks Location: om/agility0005/em/act_control.jsp?proj=PSCD8565336755E10D72391DBEA017F30

Act ▶ Goals ▶ Plan ▶ Administer

Control Panel

Expand business with most profitable customers

Access Control	None	Read	Edit	Own
Everybody	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Group <input type="text"/> <input type="button" value="v"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Group <input type="text"/> <input type="button" value="v"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Agile Manager

http://psdemo.cininteractive.com/agility0005/em/admin/profile.jsp

FIG. 29

0034740-054400
064150-0442460

Edit Achieve a 20% ROI - Netscape

File Edit View Go Communicator Help

Bookmarks Location /agility0005/am/act_summary_edit.jsp?proj=PSCD8565336755E10072391DBEA017F50

Edit Summary Cancel

Achieve a 20% ROI Submit

Goal Name
Achieve a 20% ROI

Goal Objective
Ensure that the revenue and profit contribution is significant enough to return to the Company and investors an ROI of 20% or greater.

Domain: Economics

Status: off track

Due Date: 12/31/99

Actual Goal: 7

Desired Goal: 10

Priority: 5

Risk: 4

Stage: Implement

Investment: 250000.0

Return: 1250000.0

Submit

Agile Manager Cancel

Document: Done

FIG. 30

664750" 04/22/00

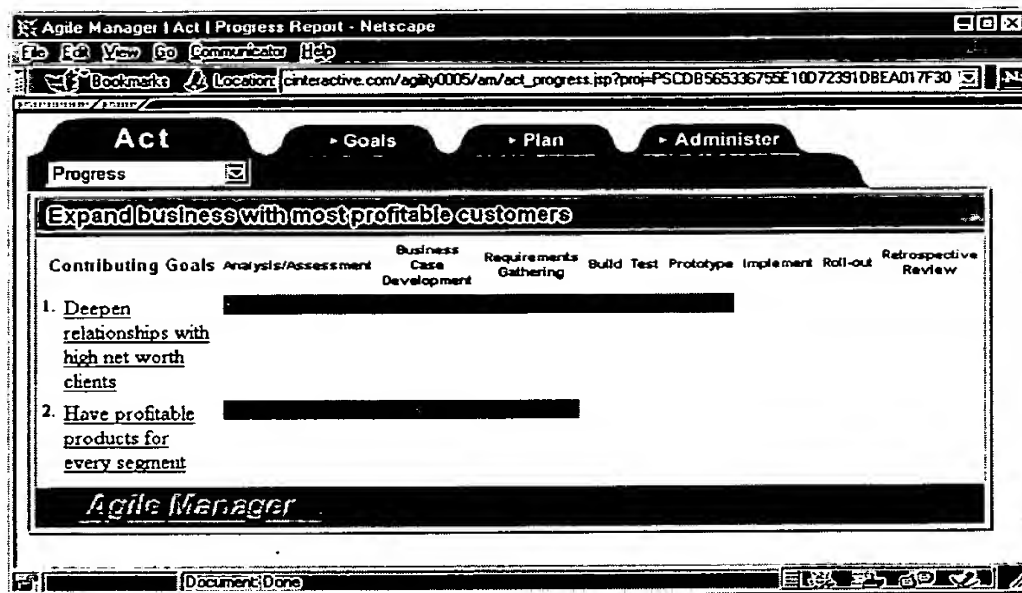


FIG. 31

00242740-051499

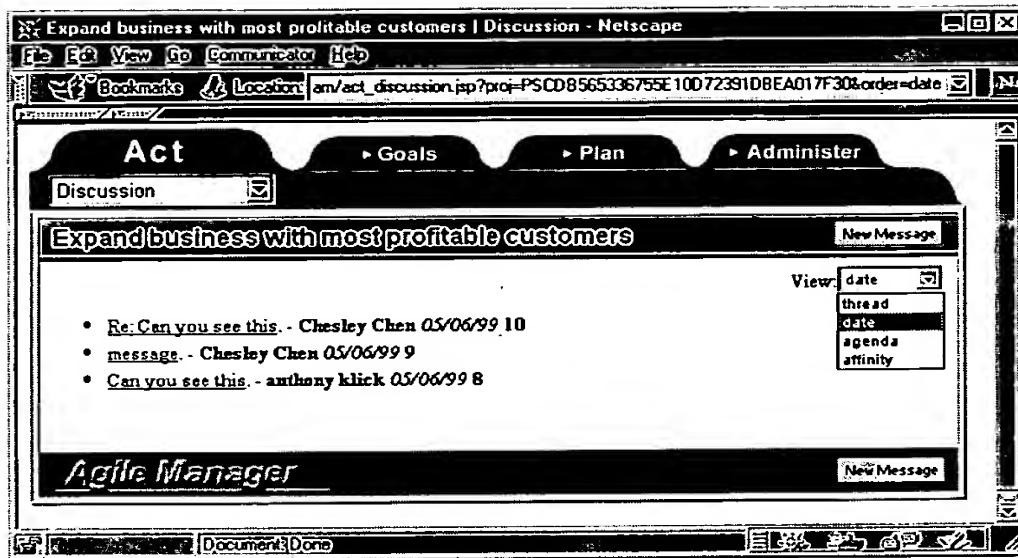


FIG. 32

664750-0424E60

Achieve a 20% ROI - Discussion - Netscape

File Edit View Go Bookmarks Location 5/am/ect_discussion_create.jsp?proj=PS CDB565336755E10D72391D8EA017F50

Post a New Discussion Message [Cancel]

Achieve a 20% ROI

Subject [Submit]

Message

On the Agenda? ☒ Affinity Group: [v]
Priority: or, New Group:

[Clear] [Submit]

Agile Manager [Cancel]

Document: Done

FIG. 33

The screenshot shows the Netscape Communicator interface with the 'Edit your link' dialog box open. The dialog box has a title bar that says 'Achieve a 20% ROI'. Inside, there's a section titled 'Edit your link Information' with 'Delete' and 'Submit' buttons. Below this are three main sections: 'Edit Link Name' with a text box containing 'CFO Magazine - Financial Conferences', 'Edit Link URL' with a text box containing 'http://www.cfonet.com/htm/conferen.html', and 'Edit Link Description' with a text box containing 'Financial oriented conferences on topical issues facing many'. There's also a section 'Or, upload a File:' with a 'Browse...' button. At the bottom of the dialog are 'Submit' and 'Cancel' buttons. The background shows the Netscape Communicator window with the address bar displaying a long URL and the status bar showing 'Document: Done'.

FIG. 34

664750-0422E00

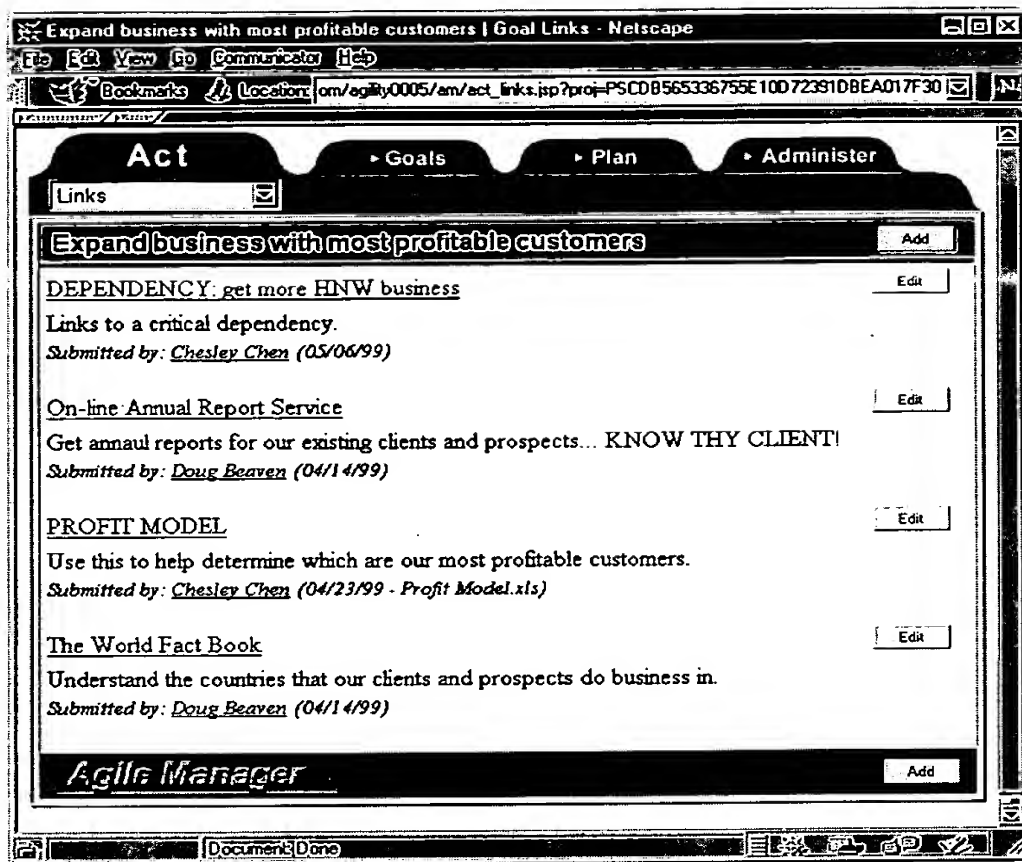


FIG. 35

EMPLOYEES ARE TREATED LIKE OWNERS

EMPLOYEES ARE TREATED LIKE AND COMPENSATED IN A MANNER REFLECTIVE OF OWNERSHIP RATHER THAN SERVITUDE.

"Employees [must] trust the company and believe changes are in their best interests." - Donald K. Clifford and Richard E. Cavanagh, *The Winning Performance*

Strongly Disagree	Disagree	Slightly Disagree	Neutral	Slightly Agree	Agree	Strongly Agree	No Response
-------------------	----------	-------------------	---------	----------------	-------	----------------	-------------

1. Managers in this company respect the rights of employees and treat them with dignity and respect.	0	0	0	0	0	0	0
2. Job objectives are aligned with the overall corporate vision.	0	0	0	0	0	0	0
3. Performance information is shared with employees so they stay focused on results.	0	0	0	0	0	0	0
4. Compensation and reward structures are aligned with company and/or unit performance.	0	0	0	0	0	0	0

High Performance

Traits:

Refresh change
 High inertia
 Clear strategy
 Customer driven
 Act like owners
 Treated like owners
 Forward risk taking
 Data based decisions
 Value based decisions
 Effective systems
 Open to new ideas
 Adapt
 Process changes
 Constant improvement
 Fluid boundaries
 Teamwork
 Anti-bureaucracy
 Know business drivers
 Make alliances
 Focused clearly
 Industry trends & challenges
 Basic Information
 Feedback

664T50" 042E2E60

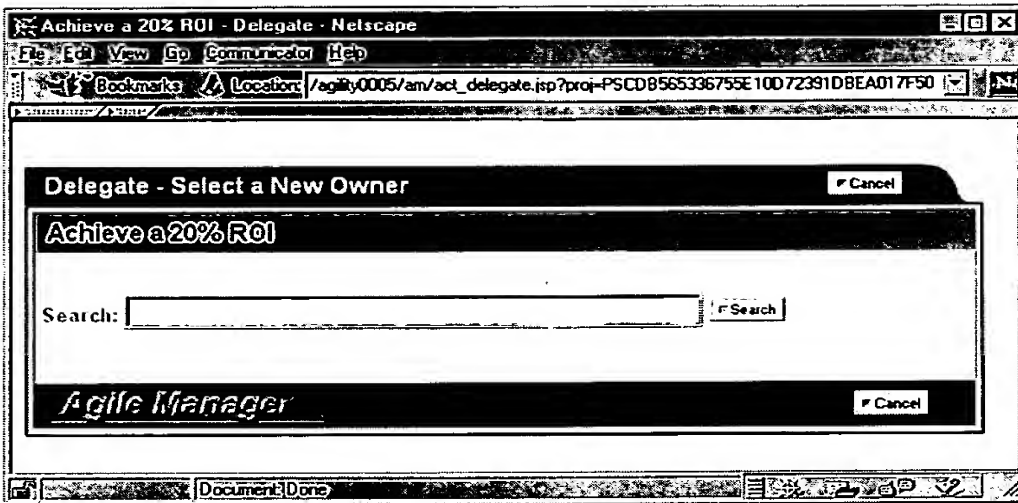


FIG. 36A

66th 50" 0142E60

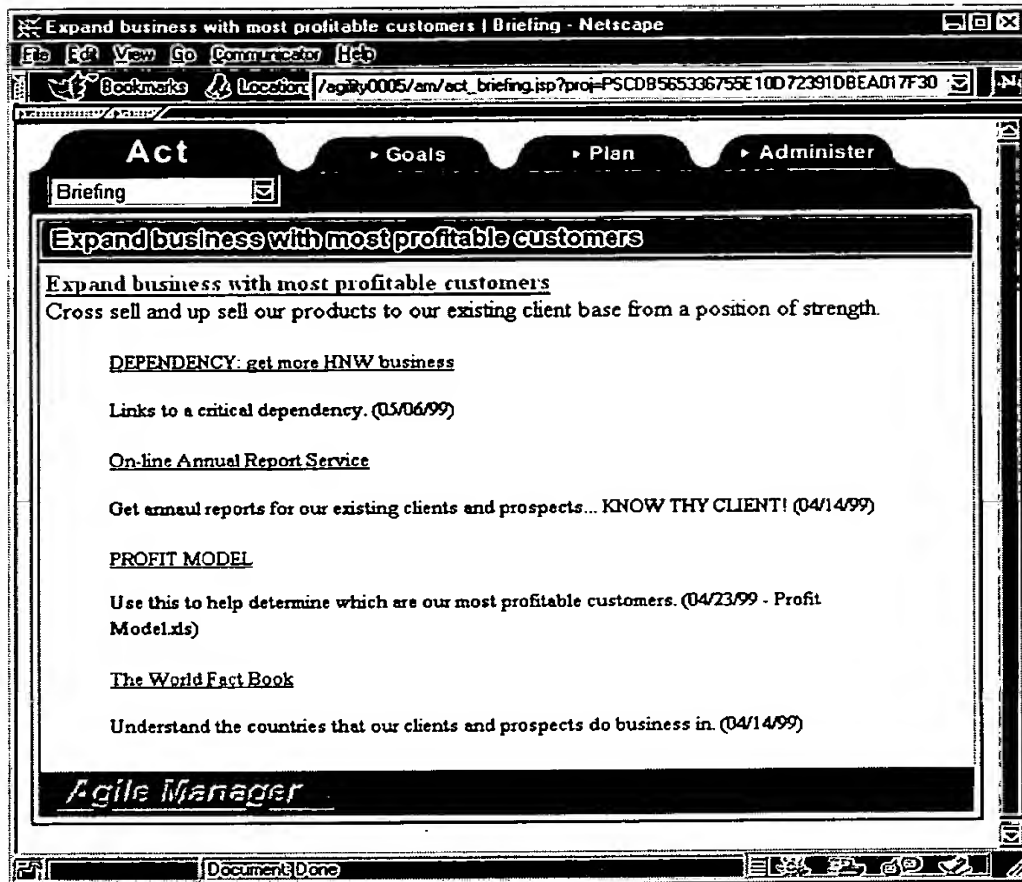


FIG. 38

00312740-051499
664150-0421E60

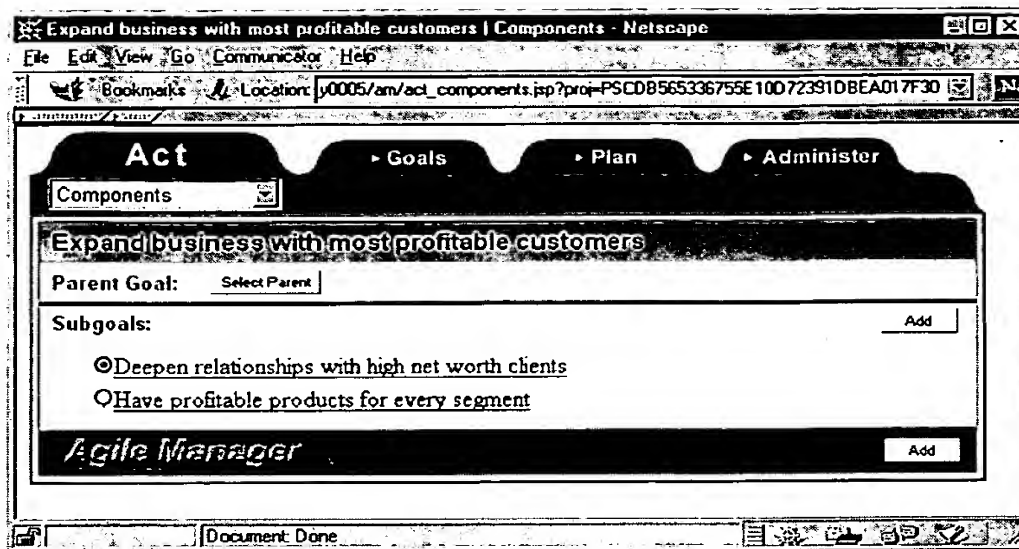


FIG. 39

0042740-0422FE60

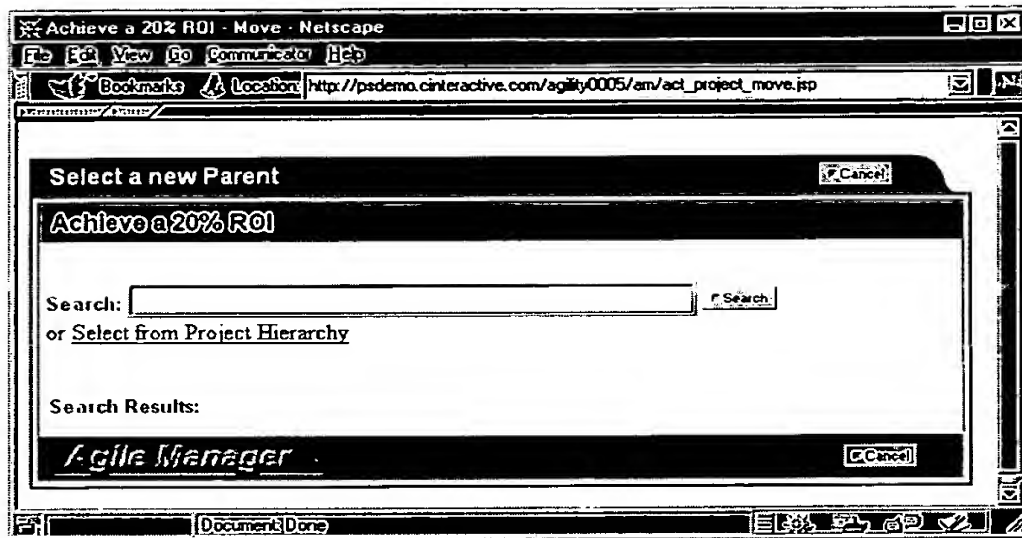


FIG. 40

00342740-051400

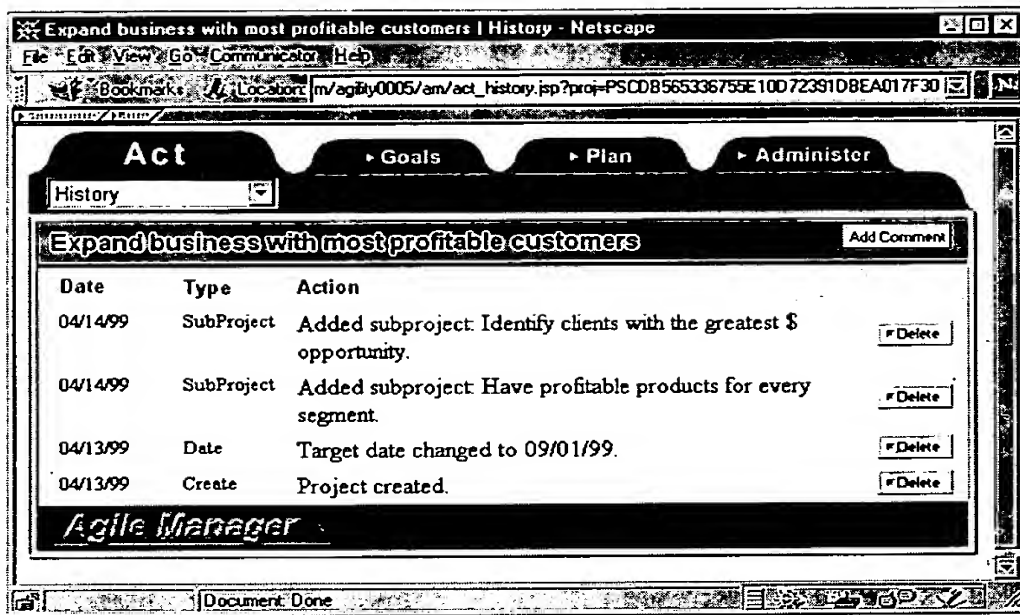


FIG. 41